

Performance Management Process

Instruction Manual



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Human Resources Department (864) 942-8503

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Employee Planning Stage

Introduction

The purpose of this document is to inform an employee of the job functions required for a position and to make the employee aware of the performance standards (see next page for definition) required for each job function.

A copy of this form can be found on page 33.

Guidelines

- Each job function should have a minimum of four and a maximum of seven performance standards.
- Each job function should be specific for this employee's job and should be a major responsibility.
- All employees should have more than one job function which they must fulfill to perform job tasks (and the job functions should be listed on the job description).

Employee Name

The name of the employee.

Employee ID Number

The Employee ID Number, is maintained by Greenwood County Payroll records. The Employee ID Number is found on the Annual Performance Appraisal Listing, pay stub, and in Munis.

Department

The name of the department in which the employee is currently working.

Continued on next page

Employee Planning Stage, Continued

Job Title

The job title, as assigned by Greenwood County, for the position in which the employee is being rated.

The job title can be found on the Annual Performance Appraisal Listing report that is sent out from HR.

Titles that are considered working titles should not be used on the Planning Stage.

Example:

Working Title: Office Manager

Job Title: Administrative Services Coordinator II

Job Functions

The detailed description of the job functions. This can be obtained from the Job Description.

Example:

Perform the following administrative duties at the front desk: answer all telephone calls, greet all customers and assist with data entry as needed.

Example 2: Customer Service Excellence

Customer Service Excellence is a County value, and this job function measures the employee's reliability, responsiveness, ability to ensure customers feel valued, capacity to demonstrate empathy, competency in obtaining accurate information, and follow through regarding resolution of customer concerns and issues.

Performance Standards

The detailed description of what is expected to achieve the job function. Be as specific as possible.

Example:

Answer all telephone calls within three rings. Greet each customer with a smile, give them your name and ask how you may help. Accurately complete all data entry given to you by the end of the day.

Continued on next page

Employee Planning Stage, Continued

**Employee
Signature and
Date**

The employee's signature and date acknowledge that he/she understands what performance level is expected while performing this job.

**Rater
Signature and
Date**

- The rater's signature acknowledges that he/she is the one who filled out the appraisal.
 - The date indicates the date in which the rater and employee met to discuss the Planning Stage.
-

**Reviewer/
Department
Head
Signature and
Date**

If the Reviewer/Department Head is someone other than the rater, their signature and date acknowledge review and approval of the Employee Planning Stage.

Employee/Supervisor Performance Appraisal

Introduction

The appraisal is the supervisor's written acknowledgement of an employee's performance for a specific period of time. The appraisal should not be a once-a-year approach to providing feedback to employees regarding their performance. Equally important, the appraisal rating should not be a surprise to the receiver. Supervisors must ensure that employees are provided appropriate and timely feedback regarding daily job performance throughout the year. Through such feedback, the employee is better able to improve performance, enhance professional development and meet supervisor expectations.

A copy of this form can be found on page 35.

Employee Name

The name of the employee.

Department

The name of the department in which the employee is currently working.

Employee ID Number

The Employee ID Number, as maintained by Greenwood County Payroll records. The Employee ID Number is found on the Annual Performance Appraisal Listing, pay stub, and in Munis.

Continued on next page

Employee/Supervisor Performance Appraisal, Continued

Job Title

The job title, as assigned by Greenwood County, for the position in which the employee is being rated.

The job title can be found on the Annual Performance Appraisal Listing report that is sent out from HR.

Titles that are considered working titles should not be used on the Employee/Supervisor Performance Appraisal.

Example:

Working Title: Office Manager

Job Title: Administrative Services Coordinator II

**Date in
Position**

The date that the rated employee was assigned to the position for which they are being rated. Note: The date in position and the date the employee's employment with the County began may be different. The date in position can be found on the Annual Performance Appraisal Listing report that is sent out from HR.

Continued on next page

Employee/Supervisor Performance Appraisal, Continued

Evaluation Type

One of the following evaluation types:

- **Annual Evaluation** – All employees, other than new employees, shall be evaluated each year at the end of the annual evaluation period (see Greenwood County Personnel Procedure for further information).
- **Probationary Evaluation** – An evaluation given when the employee performance is being monitored as a result of being placed on probation. Indicate the type of probation evaluation: New Hire, Extended New Hire Probation, Promotion, Demotion, Transfer, Disciplinary Probation or Annual Review Probation.

Rater

The printed name of the rating official, who is the person completing the appraisal. This is usually the employee's immediate supervisor.

Evaluation Period

The period of time for which the employee's performance is being rated. The department will receive annual reports from HR that will list when evaluations are due.

Rater's Supervisor Signature and Date (1)

The rater will coordinate all evaluations with their own direct supervisor prior to meeting with the employee who is being evaluated. The rater's supervisor's signature, date and department head signature, if different, is required on all appraisals.

Continued on next page

Employee/Supervisor Performance Appraisal, Continued

Employee's Acknowledgement

- The employee acknowledgement affirms that the rater and the employee met face-to-face to discuss the employee's appraisal.
- The employee's initials affirm that the rater answered their questions during the discussion. The employee's initials do not affirm agreement with the responses to the questions asked.
- In the event the employee refuses to acknowledge that an appraisal discussion and question-and-answer forum was conducted, the rater will write "refused to acknowledge" on the appraisal and have a neutral supervisor, who witnessed the refusal, sign next to the refusal of acknowledgement.

Employee Initial, Signature and Date Received

- The employee's initials acknowledge awareness of the option to complete an Employee Development Plan.
- The employee's signature acknowledges receipt of the appraisal; it does not affirm agreement with its content.
- The date received indicates the date in which the rater and employee met to discuss the evaluation.

Rater Signature and Date

- The rater's signature acknowledges that he/she is the one who filled out the appraisal.
- The date indicates the date in which the rater and employee met to discuss the evaluation.

Rater's Supervisor's Signature and Date (2)

The rater's supervisor will review the completed evaluation, to include any written comments made by both the employee and/or the rater. The rater's supervisor will sign and date the document once satisfied that all issues concerning the evaluation have been satisfactorily addressed.

Continued on next page

Employee/Supervisor Performance Appraisal, Continued

**Department
Head
Signature and
Date**

- If the Department Head is someone other than the rater, the department head will review the completed evaluation, to include any written comments made by the employee and/or the rater, and sign and date the document once he/she is satisfied that all issues concerning the evaluation have been satisfactorily addressed.
 - If the Department Head is the rater, write "same as Rater" on the signature line.
-

**Performance
Level
Descriptions
and
Definitions**

The performance measures listed below identify the rating level for each description and its related performance points. Definitions for each are also included.

Description	Performance Points	Definition
Distinguished	5	Performance and results always exceed the standards and expectations for the position requirements and objectives.
Commendable	4	Performance and results often exceed the standards and expectations for the position requirements and objectives.
Successful	3	Performance and results generally meet the standards and expectations for the position requirements and objectives.
Below Standard	2	Performance and results are inconsistent with the standards and expectations for the position requirements and objectives. Possess most of the knowledge skills and abilities required for job success but additional training or commitment is needed.
Unsatisfactory	1	Performance and results consistently do not meet the minimal standards and expectations for the position requirements and objectives.

Continued on next page

Employee/Supervisor Performance Appraisal, Continued

Section I

Job Performance and Job Function

- The employee's job performance is measured using the job description. When selecting job functions the rater should consider, when possible, a minimum of four and a maximum of seven duties for rating the employee.

Example:

Effective utilization of technology and administrative functions.

- Expectations for performance in each job function should grow over time. The rater should consider ways to increase the responsibility and expectations of the repetitive job function if possible to allow the employee an opportunity for growth and development.

NOTE: You are cautioned against adding references regarding recommendations/referrals to EAP as this may fall within ADA guidelines.

Continued on next page

Employee/Supervisor Performance Appraisal, Continued

Weight Factor	<p>□ A weight factor is used for each job function. The rater must determine the importance of each job function and assign a weight based on its importance to the overall job.</p> <ul style="list-style-type: none">• The total of job function weights must equal and cannot exceed 100%.• The employee's Planning Stage may be used to assist with identifying critical job functions and in determining the weight for each.• The weight factor is listed using a decimal point. To convert the weight factor from a percentage, place the decimal point in front of the number. For example, a weight factor of 20% should be written as .20.
Performance Level Description/ Performance Points	<p>Each performance level description is assigned a performance point. When rating an employee, choose the performance level that best describes the employee's performance (Distinguished 5 – Unsatisfactory 1).</p>
Weighted Score	<p>The weighted score is the result of the weight factor multiplied by the performance level point.</p> <p><u>Example:</u> <i>A weight factor of .20 x a performance level point of 4 = a weighted score of .80.</i></p>
Employee Initials	<p>The employee and the rater are required to discuss each job function. As an additional assurance that this discussion was conducted, the employee is required to initial each job function after it has been discussed. The employee's initials do not indicate agreement with the rating.</p>

Continued on next page

Employee/Supervisor Performance Appraisal, Continued

**Comments/
Recommend-
ations**

The comments and recommendations section is intended for the rater to provide written feedback to the employee regarding work performance. Comments/recommendations are required for all ratings. In this section, the rater should offer written comments to justify why a particular rating level was chosen and provide recommendations to aid the employee in advancing his/her performance to a higher level.

Example:

Jane received a Successful rating because she is very clear about knowing when to automate a process, making it much more efficient. A rating of Commendable could be achieved if she not only continued automating new processes but began looking at older processes to see what could be converted.

**Job
Function:
Attendance
and
Punctuality**

Attendance and punctuality is viewed by Greenwood County as important at all work levels. Periods of absence that are not excused leave or approved Family/Medical Leave will be rated and dates should be listed.

**Job
Function:
Other Duties
as Assigned**

Oftentimes employees are called upon to perform tasks that are outside of their “normal” job duties. This is an opportunity to give feedback about those tasks.

Continued on next page

Employee/Supervisor Performance Appraisal, Continued

**Weighted
Score Total**

The total for the weighted score is acquired by adding together the weighted score of each job function. This number determines the performance level (alpha) rating.

Example:

Add the weighted scores (.4 + .8 + .9 + .3 + .8) = 3.2 (Successful)

The final performance rating (numeric) along with the performance level (alpha) is placed in the rating box located on the front page of the performance appraisal form. (pg. 35)

Example:

Rating	
Alpha	Numeric
Successful	3.2

**Weighted
Score Total:
Supervisors**

See instructions for determining the weighted score total in "Weighted Score Total" above.

The final performance rating (numeric) is acquired by adding the weighted score total to the Overall Rating for Supervisory Responsibilities (Section III) and dividing by two. This number determines the performance level (alpha) rating.

Example:

Weighted Score Total = 3

Overall Rating for Supervisory Responsibilities = 3

3 + 3 = 6 divided by 2 = 3 (Successful)

The final performance rating (numeric) along with the performance level (alpha) is placed in the rating box located on the front page of the performance appraisal form. (pg. 35)

Example:

Rating	
Alpha	Numeric
Successful	3

Continued on next page

Employee/Supervisor Performance Appraisal, Continued

Below Standard or Unsatisfactory Performance Rating

- An evaluation with a final performance rating of **2.0** or below (Below Standard/Unsatisfactory) indicates substandard performance. Employees with substandard scores will be placed on probation and the supervisor must develop a Corrective Action Plan (CAP). The plan is intended to be a departmental tool for correcting work performance considered below standard and will be maintained at the supervisory level. Consequences for not correcting the work deficiency as outlined in the plan may include, but are not limited to, formal/peer training or placement in a probationary status, if deemed warranted by the supervisor.
- A re-evaluation will be accomplished at the completion of the CAP. The employee is expected to meet performance expectations within this probationary time period and to continue to meet expectations throughout employment with Greenwood County.

NOTE: See Greenwood County's Personnel Policy 7.20 – Probationary Status for more information.

Safety

- Safety is a County value and compliance is required of all Greenwood County employees. Supervisors must ensure that assigned workers are properly trained in routine workplace safety and are adhering to applicable safety policies and procedures.
- Raters must place an X in the appropriate box to indicate whether or not the employee practices safety as defined by the County and assigned department. A response of "No" in any safety area will require an explanation of the non-compliance in the comment area.

Continued on next page

Employee/Supervisor Performance Appraisal, Continued

Driving Appraisal/ License Verification

- Some jobs/positions require that the employee, as part of his/her job assignment, drive or be available to drive a County vehicle. Such an employee must maintain a valid driver's license at all times, and is not allowed to operate a vehicle without a valid driver's license of the proper class. The employee must report any change in the status of his/her driver's license to the supervisor immediately.
- Raters must place an X in the appropriate box to indicate whether or not the employee meets the requirements to drive a County vehicle. A response of "No" to having a valid South Carolina driver's license will remove the employee from the approved drivers list and may result in disciplinary action. A response of "No" to demonstrating safe driving practices will require an explanation of the non-compliance in the comment area.
- It is the supervisor's responsibility to verify the validation of the employee's driver's license by following these instructions:
 - 1) Go to www.scdmvonline.com.
 - 2) Click once on Public Services.
 - 3) Under Driver Services click once on Driver Record Points and Status.
 - 4) Enter the employee's driver's license number, SSN and date of birth.

Continued on next page

Employee/Supervisor Performance Appraisal, Continued

Section II

Organizational Values

- Organizational values are core requirements for all Greenwood County employees and are listed on page 41. These core requirements represent the values of the organization and are expected to be demonstrated by County employees during all County sanctioned work activities.
- Both the supervisor and the employee should openly discuss each value. Supervisors are expected to use this as a development opportunity and provide specific and relevant examples that support the feedback being given to the employee. Supervisors must also ensure that the feedback given is based on factual and specific observations and/or documented accounts.
- Supervisors must make employees aware that in some cases violation of these stated values could result in formal disciplinary action, including termination.

Employee Comments

- ☐ The employee comment section is intended to be used by the employee to indicate any agreement, disagreement or general concern with the appraisal.
 - If needed, the employee may use additional paper and attach it to the appraisal.
 - The employee will be allowed three work days to submit comments on their appraisal. A time extension may be permitted by the rater's supervisor only for extreme and unusual circumstances, which prevent timely submissions.
 - Supervisor comments are made on each item within the appraisal itself. No additional comment space is made available for supervisor comments; however, the supervisor may attach additional pages if needed.
-

Supervisory Duties/Responsibilities

Section III

Introduction An employee who has supervisory responsibilities will be evaluated on performing duties and responsibilities as a Greenwood County supervisor. The supervisory duties and responsibilities are established as written on the Supervisory Duties/Responsibilities form and will be rated as follows:

A copy of this form can be found on page 42.

Description	Performance Points	Definition
Distinguished	5	Performance and results always exceed the standards and expectations for the position requirements and objectives.
Commendable	4	Performance and results often exceed the standards and expectations for the position requirements and objectives.
Successful	3	Performance and results generally meet the standards and expectations for the position requirements and objectives.
Below Standard	2	Performance and results are inconsistent with the standards and expectations for the position requirements and objectives. Possess most of the knowledge skills and abilities required for job success but additional training or commitment is needed.
Unsatisfactory	1	Performance and results consistently do not meet the minimal standards and expectations for the position requirements and objectives.

Continued on next page

Supervisory Duties/Responsibilities, Continued

Overall Rating for Supervisory Responsi- bilities

- The supervisory duties/responsibilities listed in Section III are not weighted.
- Use whole numbers only when rating each duty/responsibility.
- After each duty/responsibility has been rated, add the ratings and divide by the number of duties/responsibilities to arrive at the overall rating for Section III.
- The number of duties/responsibilities used will be either 6 or 7, depending on whether or not "G" is rated. If "G" is not rated, place an N/A in the space beside this duty/responsibility.
- Add the overall rating in Section III to the weighted score total in Section I of the Employee/Supervisor Performance Appraisal form and divide by two. The result will be the supervisor's final rating score.

Comments

The comments section is an opportunity for either the supervisor or the rater to add comments related to the supervisory duties/responsibilities.

Employee Development Plan (EDP)

Introduction	Employees who want to formalize their quest for movement within the County and are interested in receiving supervisory support and other County offered assistance with education and/or job/career development will be required to create, with their supervisor, an Employee Development Plan (EDP). This plan will serve as a blueprint for the steps necessary to accomplish objectives and reaching EDP goals. The supervisor and employee will work together to develop a customized plan designed to help the employee meet their goal. Please include the original EDP along with the appraisal form and forward it to Human Resources.
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A copy of this form can be found on page 43.

NOTE: This document may be used as-is or changed to suit the employee's specific developmental needs.

Education Plan	Employees who wish to earn a degree or attend formal classroom training for their personal or professional development should consider an Education Plan. If the employee wishes to participate in the Tuition Incentive Reimbursement program, an education plan is required.
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NOTE: See Greenwood County's Personnel Policy 8.20 – Tuition Incentive for more information.

Job/Career Development Plan	Employees who wish to advance in their current position or into another position within the County should consider a Job/Career Development Plan.
------------------------------------	---

Employee Acknowledgement	The employee acknowledgement affirms that the supervisor and the employee met face-to-face to discuss the EDP.
---------------------------------	--

Supervisor Acknowledgement and Comments	The supervisor acknowledgement affirms that the supervisor met with the employee and assisted in the development of the EDP. Comments and feedback can also be included in this section.
--	--

Corrective Action Plan (CAP)

Introduction

For evaluations rated overall as inconsistent or unsatisfactory (numerical score of 2.99 or below), the Supervisor, with the employee, will develop a Corrective Action Plan (CAP). The plan is intended to be a departmental tool for correcting work performance considered below standard and will be maintained at the supervisory level.

The supervisor will be responsible for ensuring the CAP is implemented within a maximum of 30 days from the date the evaluation was presented to the employee.

Consequences for not correcting the work deficiency as outlined in the plan may include, but are not limited to, formal/peer training or placement in a probationary status, if deemed warranted by the supervisor.

The supervisor keeps this document in the supervisor file; it is not sent to Human Resources as a working document.

NOTE: This document is a sample. Please feel free to modify the document if needed.

A copy of this form can be found on page 45.

Employee Name

The name of the employee.

Rating Official The supervisor who develops the CAP.

Continued on next page

Corrective Action Plan (CAP), Continued

Job Title

The job title, as assigned by Greenwood County Human Resources Department, for the position in which the employee is being rated.

The job title can be found on the Annual Performance Appraisal Listing report that is sent out from HR on an annual basis.

Titles that are considered working titles should not be used on the CAP.

Example:

Working Title: Office Manager

Job Title: Administrative Services Coordinator II

Employee ID Number

The Employee ID Number, as maintained by Greenwood County Human Resource (HR) records. The Employee ID Number is found on the Annual Performance Appraisal Listing, pay stub, time sheet and other Greenwood County HR documents.

Deficiency

This section should describe the specific areas of improvement expected. It's very important that the information is written so that the employee clearly understands how the current performance is below standard.

Example:

Mary consistently fails to meet deadlines – typically two weeks after a due date. For example, her monthly report is due on the third of each month and she turns it in two weeks late every month.

Continued on next page

Corrective Action Plan (CAP), Continued

Corrective Action

The supervisor should clearly identify the performance that is desired. Available resources, timelines and anything else that might help the employee successfully improve performance should also be listed in this section.

Example:

Beginning immediately, Mary is to meet all departmental deadlines given to her. To assist her in this, we will meet each Monday morning to discuss her upcoming deadlines for the week. If she feels she cannot meet a deadline, she is to see me two days before the deadline.

Consequences for Failing to Meet Job Function Performance Standards

Consequences for not correcting the work deficiency as outlined in the plan may include, but are not limited to, formal/peer training or placement in a probationary status, if deemed warranted by the supervisor.

Example:

If Mary cannot demonstrate that she can meet all deadlines at the end of two months' time, she will be placed on disciplinary probation.

If disciplinary action is a result of not satisfying the CAP, attach a copy of the CAP to the disciplinary form that will be submitted to Human Resources.

CAP Start and End Dates

The supervisor will determine a start date for the CAP and an end date, if applicable.

Employee Comments

The employee comments section is intended to be used by the employee to indicate any agreement, disagreement or general concern with the CAP.

Supervisor Comments

The supervisor comments section is intended to be used by the supervisor to indicate anything further about the performance deficiency or what is required to correct it.

Continued on next page

Corrective Action Plan (CAP), Continued

**Employee
Acknowledgement**

The employee acknowledgement affirms understanding of the information included in the CAP.

**Rating Official
Signature**

The rating official's signature acknowledges that he/she is the one who completed the CAP.

Management Performance Appraisal

Introduction The appraisal is the written acknowledgement of a manager's performance for a specific period of time. The appraisal should not be a once-a-year approach to providing feedback to managers regarding their performance. Equally important, the appraisal rating should not be a surprise to the receiver. Managers should be provided with appropriate and timely feedback regarding job performance. Through such feedback, the manager is better able to improve performance, enhance professional development and meet expectations.

A copy of this form can be found on page 46.

Employee Name The name of the employee.

Job Title The job title, as assigned by Greenwood County Human Resources Department, for the position in which the employee is being rated.

The job title can be found on the Annual Performance Appraisal Listing report that is sent out from HR on an annual basis.

Titles that are considered working titles should not be used on the Management Performance Appraisal.

Example:

Working Title: Office Manager

Job Title: Administrative Services Coordinator II

Department The name of the department in which the employee is currently working.

Continued on next page

Management Performance Appraisal, Continued

Employee ID Number	The Employee ID Number, as maintained by Greenwood County Human Resource records. The Employee ID Number is found on the Annual Performance Appraisal Listing, pay stub, time sheet and other Greenwood County HR documents.
Evaluation Period	The period of time for which the employee's performance is being rated.
Type of Evaluation	<p>One of the following evaluation types:</p> <ul style="list-style-type: none">• Annual Evaluation – All employees, other than new employees, shall be evaluated each year at the end of the annual evaluation.• Probationary Evaluation – An evaluation given when the employee performance is being monitored as a result of being placed on probation. Indicate the type of probation evaluation: New Hire, Extended New Hire Probation, Promotion, Demotion, Transfer, Disciplinary Probation or Annual Review Probation.

Continued on next page

Management Performance Appraisal, Continued**Ratings**

The performance measures listed below identify the rating level for each description and its related performance points. Definitions for each are also included.

Description	Performance Points	Definition
Distinguished	5	Substantially exceeds expectations. Results are outstanding and clearly exceptional in relation to projected goals. Performance is characterized by exemplary accomplishments throughout the rating period. All responsibilities have been mastered and are performed in an extraordinarily professional manner.
Commendable	4	Exceeds expectations. Performance frequently exceeds job requirements and objectives. Employee regularly demonstrates substantial ability and performance and a willingness to make contributions which exceed those required by the job and produces high quality results in achieving goals.
Successful	3	Attains expectations; fully satisfactory performance. Performance meets and sometimes exceeds job requirements and objectives. Employee meets job responsibilities in a successful, competent manner, demonstrates sound performance, and achieves quality results in achieving goals.

Continued on next page

Management Performance Appraisal, Continued

Description	Performance Points	Definition
Below Standard	2	Performance sometimes meets job requirements and objectives but occasionally falls short. Achievement is below the acceptable level; improvement is needed to achieve a competent level. (This rating can apply to an employee who is relatively new to the job, functioning in a learning capacity and developing skills. It could also apply to a tenured employee whose performance has diminished or not met necessary improvements since the last evaluation.)
Unsatisfactory	1	Substantially fails to attain minimum requirements and expectations. Results clearly fall short of projected goals.

Continued on next page

Management Performance Appraisal, Continued

Job Function

There are eight job functions that are rated:

- Fiscal Responsibility and Program Development
- Planning
- Setting and Tracking Goals
- Leadership Abilities
- Communication
- Employee Development and Appraisal
- Promoting Equal Opportunity
- Safety and Security

For each job function, specific tasks/responsibilities are listed. A rating (5-1) should be given for each task/responsibility.

Overall Rating The overall rating (numeric value) is acquired by adding the rating of each task/responsibility and dividing by the number of tasks/responsibilities.

The numeric value determines the definition.

Example:

$A = 3$

$B = 2$

$C = 4$

$D = 3$

Sum of Tasks/Responsibilities = 12

12 divided by 4 = 3 (Successful)

NOTE: If the online form is used, the calculation for numeric value is done automatically. If a paper form is used, the calculation will have to be done manually.

Continued on next page

Management Performance Appraisal, Continued

Comments

The comments section is intended for the rater to provide written feedback to the employee regarding work performance. In this section, the rater should offer written comments to justify why a particular rating level was chosen and provide recommendations to aid the employee in advancing his/her performance to a higher level.

Example:

John received a Commendable rating because he exemplifies outstanding leadership abilities. When John delegates an assignment, he provides excellent coaching that is necessary to the employee's success. He is also a catalyst for change and his enthusiasm and positive attitude is appreciated by his staff. He sets a high ethical standard for his team and is a great example to all who work with him.

**Management
Goals/
Objectives**

This comments section is intended for the rater to provide written feedback to the employee regarding management goals and objectives that were set during the previous evaluation period. Successes as well as areas for improvement should be noted.

Continued on next page

Management Performance Appraisal, Continued

Overall Performance Evaluation

The overall numerical rating is acquired by adding the numeric values for each job function and dividing by eight.

The overall numerical rating determines the rating definition for the overall performance evaluation.

Example:

1 = 3

2 = 2

3 = 4

4 = 3

5 = 4

6 = 2

7 = 3

8 = 3

Sum of functions = 24

24 divided by 8 = 3.00 (Successful)

NOTE: If the online form is used, the calculation for overall numerical rating is done automatically. If a paper form is used, the calculation will have to be done manually.

Below Standard or Unsatisfactory Rating

- If the overall numerical rating is below 3.0 or if two or more of the major job function receive a rating of below standard or unsatisfactory, the rating will be considered as substandard performance and the employee will be placed in a probationary status and reevaluated within six months.
 - If, during the six-month period, performance remains substandard, demotion or dismissal may result.
-

Continued on next page

Management Performance Appraisal, Continued

**Employee
Comments**

The employee comment section is intended to be used by the employee to indicate any agreement, disagreement or general concern with the appraisal.

If needed, the employee may use additional paper and attach it to the appraisal.

**Employee
Signature and
Date**

- The employee signature affirms that the rater and the employee met face-to-face to discuss the employee's appraisal and that the rater answered the employee's questions during the discussion. The employee's signature does not affirm agreement with the responses to the questions asked. In the event the employee refuses to sign, the rater will write "refused to sign" on the employee signature line and have a neutral supervisor, who witnessed the refusal, sign next to the refusal of signatures.
 - The date indicates the date in which the rater and employee met to discuss the evaluation.
 - Generally, this section applies to the County Manager as the rater and to Department Heads as the employee.
-

**County
Manager
Signature and
Date**

- The County Manager's signature acknowledges that he/she is the one who filled out the appraisal.
 - The date indicates the date in which the rater and employee met to discuss the evaluation.
-

Management Goals and Objectives

Introduction	This form is to be used to set management goals and objectives for the upcoming evaluation period.
---------------------	--

A copy of this form can be found on page 51.

Employee Name	The name of the employee.
----------------------	---------------------------

Department	The name of the department the employee is currently working in.
-------------------	--

Appraisal Period	The period of time for the upcoming evaluation period in which the goals and objectives will be accomplished.
-------------------------	---

Goals and Objectives	Detailed short-term and long-term goals and objectives should be listed.
-----------------------------	--

Example:

Joe is to get his certification in HVAC by August 31, 2016.

Personal/ Professional Goals	These goals are optional. These goals should include anything that will assist the manager in personal or professional growth.
-------------------------------------	--

Example:

Brenda wants to be a better public speaker and be more comfortable speaking to larger groups. To accomplish this, she will join Toastmasters in July of 2016 to assist her in becoming a better public speaker. Brenda should also attend one public-speaking class offered through Human Resources by the end of next year.

Employee and Reviewer Signatures	The employee and reviewer signatures affirm that goals and objectives were set for the upcoming appraisal period.
---	---

Sample Forms

Contents

These forms can be found on the following pages.

NOTE: These forms may also be found on the County website under the employee link, under County Documents and Forms:

Forms
Employee Planning Stage
Employee/Supervisor Appraisal
Supervisory Duties/Responsibilities
Employee Development Plan
Corrective Action Plan
Management Performance Appraisal
Management Goals and Objectives

Continued on next page

**GREENWOOD COUNTY
Employee Planning Stage**

Employee Name: _____ Employee ID# _____

Department: _____ Job Title: _____

NOTE: For instructions on how to complete this form, please see the Planning Stage section in the Performance Management Process Instructions beginning on page one.

Job Function:	Performance Standards:
(1)	
(2)	
(3)	
(4)	

Performance Management Process

Employee Planning Stage, page 2

Job Function:	Performance Standards:
5)	
6) Attendance and Punctuality	
7) Other Duties as Assigned	

I have reviewed the above job functions and performance standards and understand what is expected of me in my position with the County of Greenwood. I have received a copy of this form for my files.

****Supervisors/Managers only:** I have also received a copy of the Supervisory Duties and Responsibilities.**

Signed:

Employee Signature

Date

Rater Signature

Date

Reviewer/Department Head Signature

Date

Performance Management Process

GREENWOOD COUNTY GOVERNMENT Employee/Supervisor Performance Appraisal

Rating	
Alpha	Numeric

Employee Name: _____

Department: _____ Employee ID#: _____

Job Title: _____ Date in Position: _____

Evaluation Type: ☐ Annual ☐ Probationary, (Type): _____

Rater: _____ Evaluation Period: from _____ to _____

Rater's Supervisor Signature (1): _____ Date _____

(To be signed if appraisal is below Meets Standards.)

Employee's Acknowledgment:

I met with my supervisor on the date indicated and reviewed this performance appraisal in detail. **My signature below affirms my receipt of this document. It does not indicate my agreement with its content.** During my evaluation review, my rating official discussed each area of my evaluation with me and responded to my questions. (Employee initial the appropriate line) Yes: _____ No: _____

The optional Employee Development Plan has been explained to me. I am aware that I may initiate the optional plan as I desire. (Employee initial the appropriate line) Yes: _____ No: _____

Employee Signature: _____ Date Received: _____

Rater Signature: _____ Date: _____

Rater's Supervisor Signature (2): _____ Date: _____

I have reviewed this evaluation and the comments made by both the rater and employee. My signature affirms that I concur with the rating on this evaluation. I believe it to be aligned with the performance of the rated employee.

Department Head Signature: _____ Date: _____

I have reviewed this evaluation and the comments made by both the rater and employee. My signature affirms that I concur with the rating on this evaluation. I believe it to be aligned with the performance of the rated employee.

Performance Level Descriptions and Definitions:

Distinguished	5	Performance and results always exceed the standards and expectations for the position requirements and objectives.
Commendable	4	Performance and results often exceed the standards and expectations for the position requirements and objectives.
Successful	3	Performance and results achieved generally meet the standards and expectations for the position requirements and objectives.
Below Standard	2	Performance and results are inconsistent with the standards and expectations for the position requirements and objectives. Possess most of the knowledge skills and abilities required for job success but additional training or commitment is needed.
Unsatisfactory	1	Performance and results consistently do not meet the minimal standards and expectations for the position requirements and objectives.

Performance Management Process

Section I - Job Performance:

The employee's job performance is measured using selected job functions from the employee's job description. Expectations for performance in each job function should increase over time. The rater should consider ways to increase the responsibility and expectations of repetitive job function, if possible, to allow the employee an opportunity for growth and development. The supervisor will prepare and review with the employee a Corrective Action Plan (CAP) for any evaluation rated below standard or unsatisfactory. The supervisor will be responsible for monitoring the CAP and ensuring its implementation within 30 days of the employee's signature on this evaluation. Consequences for failure to meet the requirements of the CAP will be identified during its development.

A weight factor is used for each job function. The rating official must determine the importance of each job function and assign each function a weight based on its importance to the overall job. The combined total of job function weights must equal and cannot exceed 100% (See instructions for further directions).

(1) Job Function:

Weight Factor	X	Distinguished 5	Commendable 4	Successful 3	Below Standard 2	Unsatisfactory 1	= Weighted Score 0.00	Employee Initials
	X						=	

Comments/Recommendations:

(2) Job Function:

Weight Factor	X	Distinguished 5	Commendable 4	Successful 3	Below Standard 2	Unsatisfactory 1	= Weighted Score 0.00	Employee Initials
	X						=	

Comments/Recommendations:

Performance Management Process

(3) Job Function:

Weight Factor	X	Distinguished 5	Commendable 4	Successful 3	Below Standard 2	Unsatisfactory 1	=	Weighted Score 0.00	Employee Initials
	X						=		

Comments/Recommendations:

(4) Job Duty Function:

Weight Factor	X	Distinguished 5	Commendable 4	Successful 3	Below Standard 2	Unsatisfactory 1	=	Weighted Score 0.00	Employee Initials
	X						=		

Comments/Recommendations:

(5) Job Function:

Weight Factor	X	Distinguished 5	Commendable 4	Successful 3	Below Standard 2	Unsatisfactory 1	=	Weighted Score 0.00	Employee Initials
	X						=		

Comments/Recommendations:

Performance Management Process

(6) Job Function:

Weight Factor	X	Distinguished 5	Commendable 4	Successful 3	Below Standard 2	Unsatisfactory 1	=	Weighted Score 0.00	Employee Initials
	X						=		

Comments/Recommendations:

(7) Job Function:

Weight Factor	X	Distinguished 5	Commendable 4	Successful 3	Below Standard 2	Unsatisfactory 1	=	Weighted Score 0.00	Employee Initials
	X						=		

Comments/Recommendations:

Performance Management Process

(8) Job Function: Attendance and Punctuality

Note: If, during this rating period, the employee has been out on Family/Medical Leave, or other leave, do not consider this period of absence in your rating. Periods of absence that are not scheduled leave or approved Family/Medical Leave will be rated.

This employee has been absent for:

☐ Unscheduled Tardies: _____ ☐ Unscheduled Absences: _____

(must be documented):

Weight Factor	X	Distinguished 5	Commendable 4	Successful 3	Below Standard 2	Unsatisfactory 1	=	Weighted Score	Employee Initials
	X						=	0.00	
Comments/Recommendations:									

(9) Job Function: Other Duties as Assigned

In addition to Job Functions, accepts and satisfactorily accomplishes all other duties as they are assigned.

Weight Factor	X	Distinguished 5	Commendable 4	Successful 3	Below Standard 2	Unsatisfactory 1	=	Weighted Score	Employee Initials
	X						=	0.00	
Comments/Recommendations:									

Total Weights: 0

(For non-supervisor employees, this will also be their final performance rating score.) **Weighted Score Total = 0.00**

5=Distinguished 4-4.99=Commendable 3-3.99=Successful 2-2.99=Below Standard 1-1.99=Unsatisfactory

(To be completed with **supervisor** evaluations only)

Weighted Score Total 0.00 + Section III Overall Supervisory Rating 0.00 = 0.00 ÷ 2 = Final Performance Rating of: 0.00

Performance Management Process

An evaluation with a final performance rating of below **3.0 (Below Standard//Unsatisfactory)** indicates substandard performance. Employees with substandard scores will be placed on probation with a developed CAP. A re-evaluation will be accomplished at the completion of the CAP. The employee is expected to meet performance expectations within this probationary time period and to continue to meet expectations throughout employment with Greenwood County. (See Greenwood County Personnel Procedure 7.20 for specific procedures).

Safety:

Note – **Safety is identified as a County value. Both the supervisor and the employee should openly discuss this value and its impact.** County departments that have safety requirements beyond routine safety awareness or that are job specific will rate the employee's safety compliance as a job function and the resulting score will be included as part of the employee's overall performance rating.

Practices safety as defined by the County: ☐ Yes ☐ No

Practices departmental safety requirements: ☐ Yes ☐ No

Comments/Recommendations:

Driving Appraisal/License Verification:

Some Jobs/Positions require that the employee, as part of his/her job assignment, drive or be available to drive a County vehicle. Such an employee must maintain a valid driver's license at all times, and is not allowed to operate a vehicle without a valid driver's license of the proper class. Any change in the status of such an employee's driver's license must be reported to his/her supervisor immediately.

This employee is required or may be asked to operate a County vehicle: ☐ Yes ☐ No
(If "No," skip to Section II on the next page.)

If "Yes," does this employee have a valid South Carolina Driver's License? ☐ Yes ☐ No

Note: A response of "No" to this question will remove the employee from the approved drivers list, and may result in disciplinary action.

This employee demonstrates safe driving practices in County vehicles: ☐ Yes ☐ No

Comments/Recommendations:

Section II - Organizational Values

Organization values are core requirements for all Greenwood County employees. These core requirements represent the values of the organization and are expected to be demonstrated by County employees during all County sanctioned work activities. These values are not intended to be used as part of the performance rating score results. Supervisors are expected to use this as a development opportunity and provide direct feedback to their employees regarding their compliance with the County's stated values. Supervisors must make employees aware that in some cases violation of these stated values could result in formal disciplinary action, including termination.

Both the supervisor and the employee should openly discuss each value. Supervisors should consider strengths and opportunities for improvement when giving feedback. Supervisors must provide specific and relevant examples that support the feedback being given to the employee. Supervisors must also ensure that the feedback given is based on factual and specific observations and/or documented accounts.

Greenwood County Values:

Trust/Integrity: Acts reputably and honestly in relationships with others; Promotes trust and respect.

Commitment: Takes personal responsibility and initiates appropriate actions to ensure mission success.

Communication: Openly exchanges information in a timely manner; knows who to keep informed; listens, understands and uses information with discretion. Writes and speaks in a manner that ensures the stated goals and objectives are understood by all.

Versatility: Willing to create and apply new methods to meet and overcome emerging challenges from a diverse community.

Accountability: Willingly accepts responsibility for personal actions. Fairly evaluates the actions of others.

Teamwork: Values and contributes with a positive attitude to the collective goals and daily responsibilities. Treats all with respect and helps foster good group morale.

Diversity: Treats internal and external customers with dignity and respect regardless of any individual differences.

Employee Comments (attach additional page(s) if needed):

Employee Signature: _____ Date: _____

GREENWOOD COUNTY
Section III: Supervisory Duties/Responsibilities
(includes Team Leaders)

An employee who has supervisory responsibilities will be evaluated on their achievement in the duties and responsibilities listed below. Each duty/responsibility will be rated with 5 points (Distinguished), 4 points (Commendable), 3 points (Successful), 2 point (Below Standard), or 1 point (Unsatisfactory). Each duty/responsibility should be rated using whole numbers only.

After each duty/responsibility has been rated, the total points will be added together and divided by 7 for an overall rating in this category. See note below for exception.

Supervisory Duties/Responsibilities:

- _____ A. Achieves cooperative level of interaction with the public and within the work unit.
- _____ B. Delegates responsibility and authority effectively throughout the work unit. Delegation is based on employee qualifications and ability.
- _____ C. Consistently evaluates subordinates on the basis of achievement and results and treats employees in a fair and impartial manner.
- _____ D. Schedules available personnel, equipment and facilities in an effective manner.
- _____ E. By example, maintains high ethical standards and climate.
- _____ F. Readily accepts responsibility for the overall performance of the work area.
- _____ G. Assists subordinates with developing employee development plans as requested.

Note: Mark "G" N/A if not used and divide by 6 in equation below.

Overall Rating for Supervisory Responsibilities:

(A + B + C + D + E + F +G) total 0 ÷ Number of Duties/Responsibilities 7 = _____

Comments:

GREENWOOD COUNTY
Employee Development Plan

Greenwood County encourages and supports its employees in their pursuit of professional growth and development. Employees who are interested in receiving supervisory support and other County offered assistance with education and/or job/career development will be required to create, with their supervisor, an Employee Development Plan (EDP). This plan will serve as a blueprint for the steps necessary to accomplish objectives and reach EDP goals. An EDP may be developed for education and/or job/career development.

Employees who wish to earn a degree or attend formal classroom training for their personal or professional development should consider an Education Plan. Employees who desire career development for professional growth would select a Job/Career Development Plan. The supervisor and employee will work together to develop a customized plan designed to help the employee meet their goal. See plan sample below.

Education Plan:

Education Goal:

- ☐ GED/High School Diploma ☐ Continuing Education Course ☐ Certificate
☐ Professional Certification ☐ Associate's Degree ☐ Bachelor's Degree ☐ Graduate's Degree

Major/Program/Course of study: _____

Goal start date: _____ Goal completion date: _____

Courses taken this appraisal period: _____

Courses scheduled for next appraisal period: _____

Course start date this appraisal period: _____ Projected course completion date: _____

Training Site(s): _____

Job/Career Development Plan:

The Greenwood County Job Title to which I am presently assigned: _____

- ☐ I am interested in professional development within my current career/job title
☐ I am interested in advancing to the next level within my career/job category
☐ I am interested in a job outside of my current career/job category

Job Interest: _____ Job Category: _____

The prerequisites required for my job of choice are: _____

Job training accomplished this appraisal period: _____

Job training to be accomplished next appraisal period: _____

Trainer/Training Site(s): _____

Training start date: _____ Training expected completion date: _____

- ☐ Job Shadowing: _____
- ☐ On the Job Training: _____
- ☐ Mentor-Protégé: _____
- ☐ Internal Training: _____
- ☐ Workshops/Seminars: _____
- ☐ Other: _____

Employee Acknowledgement:

*I understand this is for developmental purposes only and is **not** a contract or promise of advancement.*

Employee Signature: _____ Date: _____

Supervisor Acknowledgment and Comments:

I have met with this employee and assisted in the development of this Employee Development Plan.

The EDP for the last reporting period was: ☐ Met ☐ Met but not completely ☐ Not met ☐ No goal was set

Reason not met:

Other comments:

Supervisor Signature: _____ Date: _____

**GREENWOOD COUNTY
Corrective Action Plan**

Employee Name: _____ Employee ID#: _____

Job Title: _____ Rater: _____

Job Function: _____ CAP start date: _____ CAP end date: _____ (if applicable)

Deficiency:

Corrective Action:

Consequences for failing to meet job function performance standards:

Employee Comments:

Supervisor Comments:

Employee Acknowledgement

I understand that this Corrective Action Plan (CAP) is being implemented to address deficiencies that have been identified in my work performance. I further understand that it is my responsibility to ensure that my supervisor is made aware of any additional assistance needed by me to successfully accomplish the steps outlined in this CAP. I understand that failure to successfully complete this plan by the established end date may result in the consequences outlined in this performance plan.

Employee Signature: _____ Date: _____

Rater's Signature: _____ Date: _____

GREENWOOD COUNTY
Management Performance Appraisal

Employee Name: _____ Job Title: _____

Dept.: _____ Employee ID #: _____

Evaluation Period _____ to _____

Type of Evaluation: Annual Probationary, (Type) _____

RATINGS: Distinguished (5 points) Commendable (4 points) Successful (3 points)
Inconsistent (2 point) Unsatisfactory (1 points)

(1) Fiscal Responsibility and Program Development

- ___ A. Develops a sound fiscal budget within guidelines established by the County Manager.
- ___ B. Operates within budget constraints, minimizes controllable costs, and utilizes resources (people, equipment, money) effectively.
- ___ C. Makes assumptions about future expenditures and revenues; gathers facts and opinions to visualize and to achieve the proposed activities; develops programs and work schedules.
- ___ D. Looks for creative ways to improve efficiency; encourages cost-saving suggestions and performance from employees; encourages recycling resources.

Overall rating:

A + B + C + D ÷ 4 = 0 (Numeric Value) _____ (Definition) _____

Comments: _____

(2) Planning

- ___ A. Gathers facts and anticipates events in relation to the department's functions in order to define, establish, and communicate realistic goals, objectives, and expectations.
- ___ B. Determines policies, projects, programs, procedures, methods, systems, budgets, standards, and strategies necessary to achieve goals.
- ___ C. Adapts goals, schedules, etc. as necessary to meet changing needs and priorities; does not operate under "crisis management."
- ___ D. Achieves high-quality results and smooth operation of the department/division.
- ___ E. Keeps current on up-to-date practices within the field through reading appropriate journals, papers, etc. and attending appropriate seminars/conferences when possible.

Overall rating:

A + B + C + D + E ÷ 5 = 0 (Numeric Value) _____ (Definition) _____

Comments: _____

(3) Setting and Tracking Goals

- ____ A. Focuses on and achieves departmental mission and purpose as defined during budget process.
- ____ B. Sets realistic workload indicators and effectively utilizes them to measure departmental performance.
- ____ C. Assists subordinates with establishing management objectives within a timetable; schedules available personnel, equipment, and facilities in an efficient and effective manner.
- ____ D. Achieves positive organizational interface by supporting team concepts and contributing to overall County goals.

Overall rating:

A + B + C + D ÷ 4 = 0 (Numeric Value) _____ (Definition) _____

Comments: _____

(4) Leadership Abilities

- ____ A. Provides realistic judgment calls regarding issues, including a cooperative level of interaction with the public and intra/interdepartmental members.
- ____ B. Effectively adapts to change and maintains composure when supervising work loads which create stress and pressure.
- ____ C. Recognizes and effectively implements solutions in decision making and problem solving in a timely manner.
- ____ D. Readily accepts responsibility for departmental performance.
- ____ E. Delegates authority effectively throughout department.
- ____ F. By example, maintains high ethical standards and climate.

Overall rating:

A + B + C + D + E + F ÷ 6 = 0 (Numeric Value) _____ (Definition) _____

Comments: _____

(5) Communication

- ____ A. Orally communicates in an effective manner and utilizes effective listening habits.
- ____ B. Disseminates clear and concise written communication, including reports, memoranda, directives, and letters.
- ____ C. Effectively interprets and executes complex written and oral instructions, regulations, manuals, policies, etc.
- ____ D. Establishes and communicates work assignments to subordinates in an effective manner.
- ____ E. Effectively communicates ideas to public, policy makers, large groups, etc. choosing appropriate presentation methods.

Overall rating:

A + B + C + D + E ÷ 5 = 0 (Numeric Value) _____ (Definition) _____

Comments: _____

(6) Employee Development and Appraisal

- ____ A. Recognizes and develops full growth and potential in employees, utilizing appropriate guidance, coaching and training; effectively delegates responsibility based on employee qualifications and ability.
- ____ B. Motivates and encourages employees to pursue advancement and job enrichment opportunities through maintaining up-to-date credentials and appropriate professional development.
- ____ C. Assures employee attendance at mandatory in-service training and encourages attendance at other appropriate scheduled training. Maintains appropriate in-service and required training records in a correct and complete manner.
- ____ D. Consistently evaluates subordinates on the basis of achievement and results.
- ____ E. Schedules available personnel, equipment and facilities in an effective manner.

Overall rating:

A + B + C + D + E ÷ 5 = 0 (Numeric Value) _____ (Definition) _____

Comments: _____

(7) Promoting Equal Opportunity

- ____ A. Keeps all employees aware of equal opportunity objectives and priorities; disseminates policy information.
- ____ B. Promptly investigates complaints and takes appropriate action; does not tolerate discrimination or harassment activities/comments.

Overall rating:

A + B ÷ 2 = 0 (Numeric Value) _____ (Definition) _____

Comments: _____

Performance Management Process

Overall Performance Evaluation

The overall performance evaluation is determined by an average of all ratings given. There are eight rated items. Add the total number of points received in the ratings for each part and divide that total number of points by 8. This will give you the overall numerical rating.

Total Points 0 $\div 8 =$ 0.00 Overall Numerical Rating: _____

Rating Definition for overall performance evaluation: _____

Note: If the overall numerical rating is below 3.0, the rating shall be considered as substandard performance and the employee will be placed in a probationary status and re-evaluated within six months. If, during the six-month period, performance remains substandard, demotion or dismissal may result.

Employee Comments:

Signing this appraisal simply acknowledges the fact that you have reviewed the appraisal form and your supervisor has discussed the appraisal with you. Your signature does not mean that you necessarily agree with its contents. Please use the "Employee Comments" section to express your concerns regarding the appraisal.

Employee Signature: _____ Date: _____

Department Head Signature: _____ Date: _____

County Manager Signature: _____ Date: _____

GREENWOOD COUNTY Management Goals/Objectives

Employee Name: _____ Department: _____

For Appraisal Period: _____ to _____

NOTE: For instructions on how to complete this form, please see the Management Performance Appraisal section in the Performance Management Process Instructions.

A. Goals/Objectives (required)

Short – Term: (generally achieved in 12 months or less)

Long – Term: (generally achieved in more than 12 months)

B. Personal/Professional Goals (optional)

Employee Signature: _____ Date: _____

Reviewer Signature: _____ Date: _____